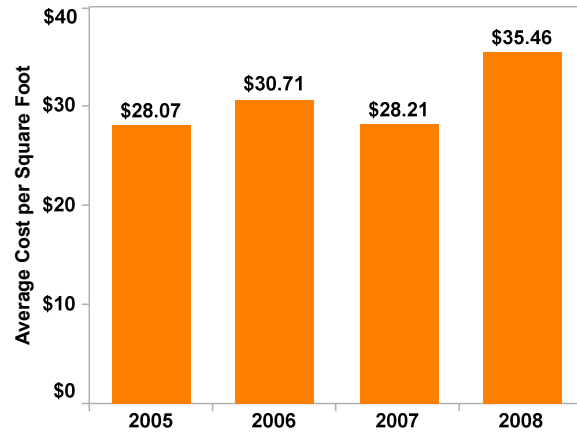
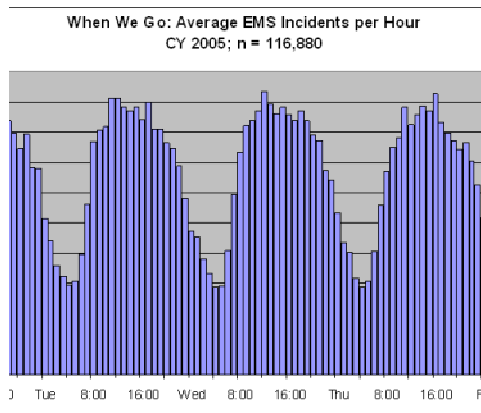


BUILDING AND MEASURING A CITY THAT WORKS

A GUIDE TO PERFORMANCE MANAGEMENT IN THE DISTRICT OF COLUMBIA



CapStat Program
Office of the City Administrator
2008

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I. INTRODUCTION

Performance Measurement is a tool that allows us to gain insight into, and make judgments about, the effectiveness and efficiency of our government programs, processes and people. By collecting and analyzing meaningful data and focusing on results that benefit District of Columbia residents, we can improve the performance of city government.

In 2008, we are in the midst of the most significant change to performance management since the creation of strategic business plans, and we are writing this guide in part to facilitate this change.¹

What's Coming in FY 2009?

- Supplementing existing performance plans so that agencies have division-level plans (described in more detail later in the manual).
- Building a Web-based data submission tool that will make data entry and reporting simpler. We intend to roll out this product in time for year-end data submission for FY 2008.
- Revising the look of our year-end reports to make them more visually accessible and more informative.

Innovation Timeframes

- **Divisional Performance Plans:** By August 1, 2008, for 6 pilot agencies (for FY09). By February 2009, for all agencies (for FY10).
- **Web-based Data Submission:** By October 20, 2008, for all agencies.
- **Improved Year-End Reports:** By December 31, 2008.

This guide seeks to:

- **Standardize the practice of performance management across District agencies**
- **Explain the uses of performance information and plans**
- **Explain the steps to creating a performance system in your organization**
- **Provide guidance on how to communicate goals, determine service areas, focus objectives on outcomes, and develop indicators that give us useful feedback**

¹ *Acknowledgements:* Performance management is by no means a new field. Most states, counties, and cities have used them in some form for decades, often employing very similar processes. Guides to performance management are also not new. In creating this guide, its authors researched, were inspired by, and occasionally borrowed from performance management guides in other jurisdictions, notably Fairfax County, Virginia and the State of Texas.

II. PERFORMANCE MANAGEMENT PRINCIPLES APPLIED IN DC

Why is Performance Management Important?

A quality performance management program 1) improves decision making, 2) enhances public transparency, and 3) complies with the law. This last point is particularly important, and worth greater explanation.

It's the Law

The "Government Managers Accountability Amendment Act of 1995" (GMAA) mandates that all District of Columbia government agencies transmit to the Council a performance plan for the next fiscal year that covers all publicly-funded activities of the agency. The performance plans are submitted at the time the Mayor transmits the annual budget to the Council. The "Performance and Financial Accountability Act of 2001" mandates a performance-based budgeting system, which now applies to all District government agencies.

How Performance Management Helps:

- Improves agency management and highlights agency priorities
- Emphasizes progress toward agency goals and objectives
- Helps make better budget, operational, personnel, and policy decisions
- Provides a basis for planning future goals and actions
- Encourages accountability and transparency
- Tracks results

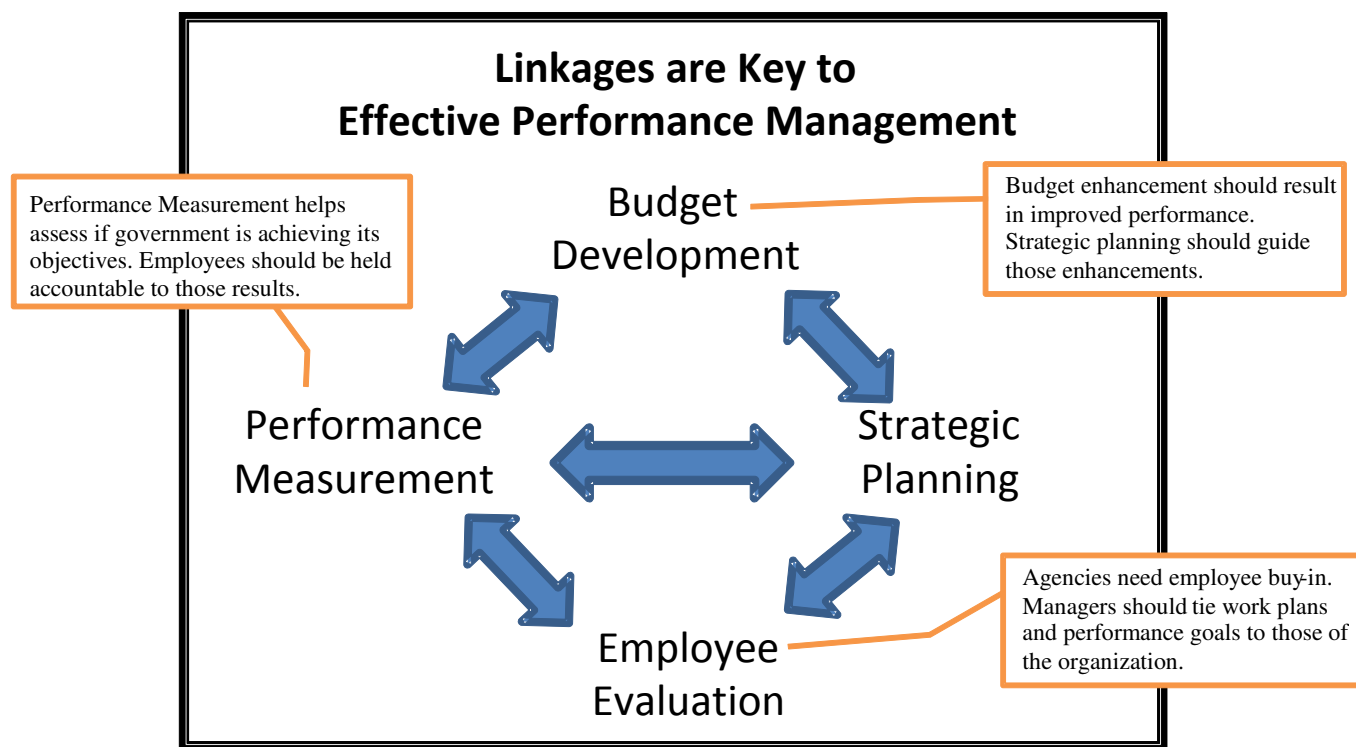
In addition, the section titled "Performance and Financial Accountability" of the DC Home Rule Act (§ 1-204.56a and §1-204-56b of the DC Official Code) requires the DC government to submit to Congress an annual performance plan and report covering each agency (the Performance Accountability Report).

In order to comply with GMAA, agency performance plans must include:

- A mission statement and objectives
- A strategic description of how the agency's mission and goals will be accomplished
- Measurable and objective performance goals for all significant activities
- One or more measures of performance for each significant activity
- The actual level of performance, compared to the target level of performance, for each performance measure included
- The name and position of the management employee(s) directly responsible for the achievement of each performance goal, as well as the management employee's immediate supervisor

What is Performance Management?

Performance management is also an extremely broad term, which in practice may differ widely between organizations. At its core, it is about helping the leadership and employees of an organization make better decisions. The most vital aspect of performance management is performance measurement, which is defined as the regular collection of specific information regarding the results of city services.



In general, a good performance measurement system should be able to provide answers to the following questions:

- **What did we achieve?**
- **How efficiently did we perform the work?**
- **What impact did our activities have on the community?**

How Has Performance Management Evolved in the District?

Performance management and measurement in the District of Columbia is by no means new. For years, the city has included performance information in its budget books and in annual reports. Agencies often have supplemented citywide reports with their own performance reports. Historically, many of the city's performance metrics tracked outputs. Our emphasis for the 2009 and 2010 planning cycles is to balance this perspective with a greater emphasis on [outcomes](#) and [efficiency](#).

District government has been measuring its performance for years. Currently, each agency has a Strategic Business Plan, most of which were written between 2001 and 2003, and an Agency Performance Plan, first created in 2007. The difference between the two is stark. Strategic Business Plans were written as part of a move toward a Performance-Based Budget, and today are used as the

principal organizing tool for the budget; it lists an agency's budget programs and activities. The Performance Plan is a concise public document that lists an agency's mission, scope of services, principal objectives, key initiatives, and essential [performance indicators](#). The focus of this manual, and of the city's current performance management system, is squarely on the Agency Performance Plan.

Over the years, the city implemented several additional innovations. We have a [benchmarking](#) report that compares outcome data in different policy areas with those of similar or surrounding jurisdictions. We have periodically evolved our reporting templates, data entry databases, and performance indicator requirements to keep up with thinking in the field.

What is CapStat?

The most significant innovation in performance management since the Fenty Administration took office is the development of the CapStat program. What CapStat represents is an effort to make performance data more relevant to the decision-making process. During hour-long CapStat sessions, the Mayor and senior staff from relevant agencies take an in-depth look at a single issue. The heart of the discussion is a careful examination of performance data central to the issue, which then serves as the point of departure for a conversation about how the District can more effectively address the issue at hand. We relentlessly track commitments made during these sessions and repeatedly come back to topics until the Mayor sees demonstrable improvements.

Mayor Fenty has repeatedly held CapStat sessions on topics as wide-ranging as violent crime, homelessness, snow removal, customer service, and energy efficiency. At the core of CapStat is the idea that accurate, compelling data about performance needs to serve as the factual foundation for tough policy decisions. From these sessions, the Mayor made and has tracked commitments to provide housing to families in DC Village, create 10,000 affordable housing units, institute focused improvement areas, and reduce the city's fixed costs. The list goes on and on, and is made accessible to the public on the CapStat website.

How is Performance Management Accomplished?

There are many approaches to performance management that can work effectively. Overall, [performance measures](#) should be developed as part of the strategic planning process and should flow from the agency's mission and objectives. Agencies should carefully review performance targets annually to determine if they logically relate to the other elements of the performance plan. That being said, it is in the agency's best interest to avoid altering the measures from year to year; doing so greatly affects the reliability and validity of the data.

As we will discuss later, there is a step-by-step methodology for creating successful and long-lasting [performance measures](#). This guide will help make this process as straightforward as possible. Finally, it is important to remember that in order to be effective, performance measurement must be useful to, and used by, key decision makers. Otherwise, it is just an exercise in bureaucratic irrelevance.

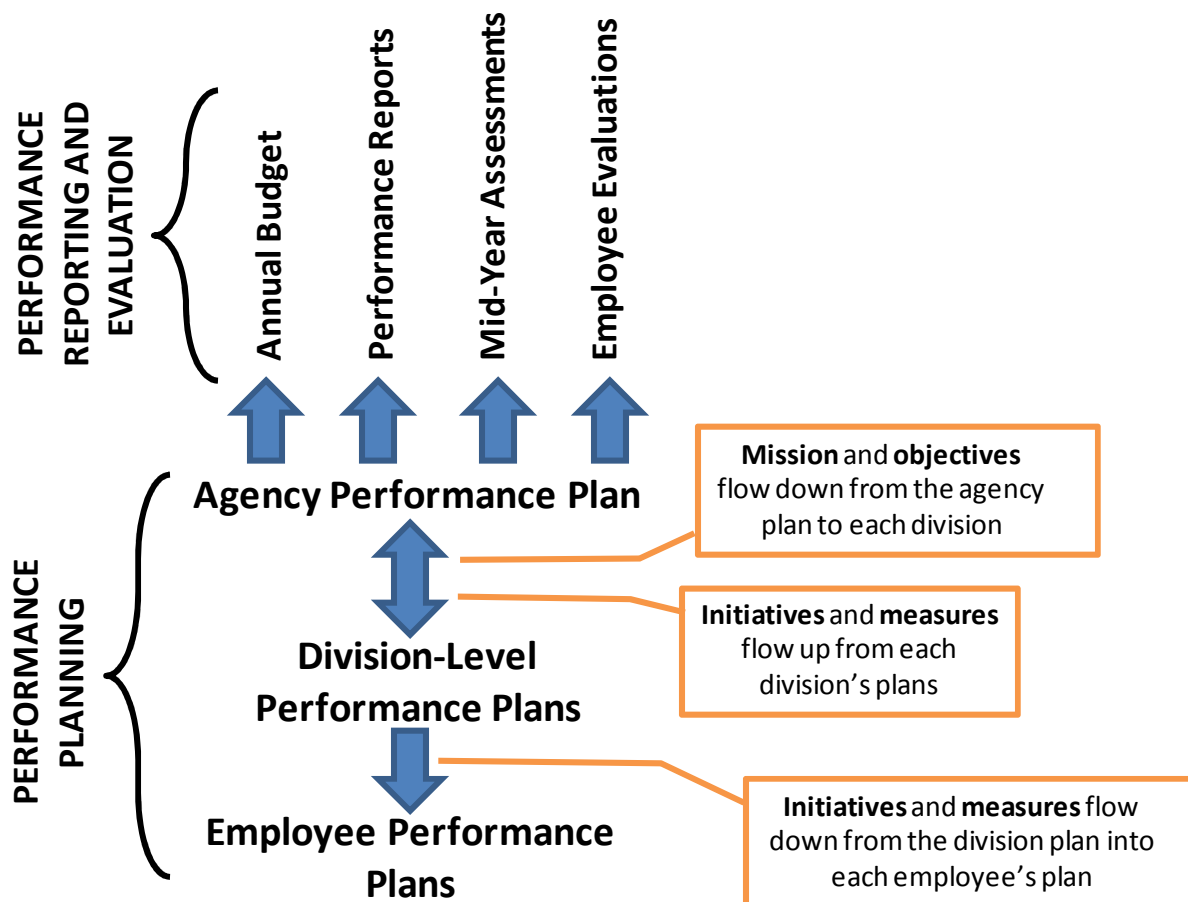
III. PERFORMANCE MANAGEMENT DOCUMENTS AND THEIR USES

What are you responsible for creating? What are we responsible for creating?

Seven documents underpin the District of Columbia's performance management system. Agencies create four of these documents and the Office of the City Administrator creates the remaining three. We focus on these deliverables because they lend some tangible focus to the process of strategic planning and employee development. All seven documents share common components and relate to each other.

Agencies are responsible for:

1. Agency Performance Plan – Each agency is required to submit an annual agency performance plan detailing objectives, initiatives and measures which will be used to evaluate agency performance.
2. Division-level Performance Plan – Beginning in FY2010, each agency division will be expected to create a plan detailing its internal programs and initiatives, which will then roll up into the agency plan.
3. Employee Performance Plans – These provide a basis for employee development and allow an agency to connect an employee's goals to those of the larger organization. They are not covered in this manual, but are nonetheless an important part of a functioning performance system.



4. Employee Evaluations – Related to the above employee plans, these summarize how well an employee succeeds in meeting the expectations outlined in their plan. These are also not covered in this manual.

The Office of the City Administrator is responsible for:

5. Mid-Year Performance Assessment – These meetings, held with the City Administrator, examine an agency's progress with defined measures.
6. Year-End Performance Accountability Report (PAR) – The PAR is published at the beginning of the calendar year and is delivered to the DC City Council and US Congress.
7. Annual Budget – In each budget submission to the Council, the budget book includes a statement of every agency's mission, services, objectives, performance measures, and prior-year performance trends.

AGENCY PERFORMANCE PLAN

Purpose – Moving forward, each department or agency will use the Agency Performance Plan developed in FY 2008 (and updated every year thereafter) to monitor and assess its performance against a defined mission, objectives, initiatives, and indicators. The primary audiences for the Agency Performance Plan are the Agency staff, City Administrator, Mayor, Council and the general public.

Cycle – As early as the beginning of the prior fiscal year, agencies will begin the annual process of revising their performance plans. Why this early? By FY 2010, the timetable for Performance Measurement will coincide with the budget development process for the District of Columbia. This is necessary in order to have updated performance measurement information available for publication in the FY 2010 Proposed Budget and Financial Plan. The table in Appendix A outlines the deadlines and deliverables for the development and implementation of the FY 2008, FY 2009, and FY 2010 Agency Performance Plans.

Key Deadlines for Agency Plans

FY2009 Plans:

- Final by September 30, 2008

FY2010 Plans:

- Draft by March 10, 2009 (includes mission, objectives, some initiatives and KPIs)
- Final by September 1, 2009 (includes all initiatives)

Components

- Agency Mission – A short comprehensive description of why an organization exists. It succinctly identifies what an organization does (or should do), and for whom it does it.
- Summary of Services – What does the agency do? A brief summary of the programs and services managed and delivered by your agency.
- Objectives – A broad statement describing desired outcomes, but more specific than the Department's mission; objectives support the mission and identify specific themes or opportunities for an agency to accomplish in order to achieve its mission. Like the agency's mission, objectives rarely change from year-to-year.

- Initiatives – What does an agency intend to accomplish that is new, better, or different? Initiatives are statements of an anticipated level of achievement, usually time limited and very specific. An initiative may include reference to targets and/or standards, and is designed to help the Department meet its objectives. All initiatives contained in the agency performance plans should be externally focused.
- Key Performance Indicators – A standard of measure used to gauge quantifiable components of performance especially by comparison with a standard or target. Valuable metrics/measures should provide insight into the performance of a program in terms of inputs, outputs, efficiency, service quality, and/or outcomes. Each metric/measure should also be tied to a specific objective.

KPI Requirements

Number of KPIs:

- At least three for each objective

Type of KPIs:

- For each objective, at least one outcome measures and one efficiency measure
- Different objectives can share the same outcome measures

DIVISIONAL PERFORMANCE PLAN

Purpose - To inform the agency performance plans, each division should develop a performance plan that is comprehensive and linked to the strategic plan of the Agency. These divisional plans will provide the foundation for the agency plan and should use the exact same template as the agency plan. Divisional performance plans should include program missions, goals, objectives, activities, and initiatives. They should also track inputs, outputs, efficiency, service quality, and outcomes, and they should outline a plan for data collection and retention. This document is the meat of our performance measurement process, because it is the basis from which all other plans flow.

Cycle – Since the divisional plan is directly connected to the agency performance plan, the timing is very similar to the agency performance plan. We did not mandate divisional plans for FY2009, but will for FY2010.

What is a “Division?”

For the purposes of this manual, we are using the term “Division” as a generic term to refer to entities one level below that of the agency structure. In reality, some of these “one-level-down” entities are called Departments, Administrations, and Bureaus in the context of their particular agency. It should reflect one’s budget structure, but does not need to. In fact, it is our expectation that agencies will restructure their budgets if there is incongruity between how they are organized operationally and how their budget is organized. **Agencies that have only one budget program beyond Agency Management do not need to create divisional plans.**

Components

- Agency Mission – A short comprehensive description of why an organization exists. It succinctly identifies what an organization does (or should do), and for whom it does it.
- Summary of Services – What does the agency do? A brief summary of the programs and services managed and delivered by your agency.
- Objectives – A broad statement describing desired outcomes, but more specific than the Department’s mission; objectives support the mission and identify specific themes or

opportunities for an agency to accomplish in order to achieve its mission. Like the agency's mission, objectives rarely change from year-to-year.

- **Initiatives** – What does an agency intend to accomplish that is new, better, or different? Initiatives are statements of an anticipated level of achievement, usually time limited and very specific. An initiative may include reference to targets and/or standards, and is designed to help the Department meet its objectives. All initiatives contained in the agency performance plans should be externally focused.
- **Key Performance Indicators** – A standard of measure used to gauge quantifiable components of performance especially by comparison with a standard or target. Valuable metrics/measures should provide insight into the performance of a program in terms of inputs, outputs, efficiency, service quality, and/or outcomes. Each metric/measure should also be tied to a specific objective.

Key Deadlines for Divisional Plans

FY2009 Plans:

- Not required (except for the pilot group)

FY2010 Plans:

- Draft by March 1, 2009, (includes mission, objectives, some initiatives and KPIs)
- Final by August 1, 2009, (includes all initiatives)

EMPLOYEE PERFORMANCE PLANS

Purpose – The District of Columbia's performance systems are designed to provide an objective and developmental approach to assessing employee performance. Employee Performance Plans are created by all District employees with their supervisors. They provide supervisors with an opportunity to communicate performance expectations to their employees and to provide them with specific feedback about their job performance. They also promote dialogue regarding career development and employee recognition as well as provide a path towards improving employee performance through training.

All employee performance plans should be meaningful, objective, and measurable.

All performance plans should be meaningful, objective, and measurable. The plan should be linked to the employee's divisional and agency performance plan. Dependent on employment status, there are two employee plans used by District employees: the Performance Management Program (PMP) and the Performance Evaluation System (PES). The District is currently reviewing the employee evaluation process for possible revision in the future.

Cycle – The Performance Management Program evaluation period is October 1 through September 30 of each year. The rating period for the PES begins on April 1 and concludes on March 31 of each year. PMP evaluations are submitted through the online system in early November, with hard copies to follow in December. PES evaluations must be submitted to the District of Columbia Department of Human Resources (DCHR) by the end of June.

EMPLOYEE EVALUATIONS

Purpose – Employee evaluations provide direct feedback to employees about their performance against goals, and promote dialogue regarding career development and employee recognition. They also serve a very practical purpose as the basis for pay-for-performance compensation and in some cases corrective or disciplinary action.

Cycle – The cycle of the employee evaluations should follow the same cycle as the employee performance plans with due dates approximately six weeks after the end of the employee performance cycle.

MID-YEAR PERFORMANCE ASSESSMENTS

Purpose – This element in our performance system is new in 2008. Its purpose is to be able to determine if an agency is on-track with implementing its initiatives and in meeting its KPI targets. All agencies will receive a written mid-year report. For most agencies, the City Administrator will also convene a CapStat session with its leadership to discuss year-to-date performance and to look ahead to the upcoming year.

Cycle – Mid-Year assessments will occur in June.

Components

- Progress against KPI targets – The assessment will include a statement of an agency's KPI targets and progress against targets for those measures for which we have data.
- Status of Initiatives – The assessment will also include a statement of progress against initiatives. We will determine 1) whether an agency has implemented the initiative; 2) if not, then why; 3) and if it has, then whether an agency made its intended impact, if it stayed within budget or a stated timeline, and the level of assistance needed from the OCA to implement the initiative.

YEAR-END ACCOUNTABILITY REPORTS (PARs)

Purpose – The Performance Accountability Report is mandated by the “Government Managers Accountability Amendment Act of 1995.” In assessing agency performance, actual results are compared against targets and goals that were set in the annual performance plan and were developed to help carry out an agency's strategic plan.

The goal of the PAR is to view performance results achieved. This document also provides citizens with insight into the agency roles for the financial activities of the DC Government.

Cycle – The PAR process is annual. Agencies are asked to report data on each of their KPIs to the Office of the City Administrator on a quarterly basis. These are then reviewed and verified by the OCA analysts responsible for that agency. The report is submitted to the Council by January 15 and to Congress by March 1, as mandated by the “Federal Payment Reauthorization Act of 1994.”

Components

- Agency Mission – A short comprehensive description of why an organization exists. It succinctly identifies what an organization does (or should do), and for whom it does it.
- Summary of Services – What does the agency do? A brief summary of the programs and services managed and delivered by your agency.
- Objectives – A broad statement describing desired outcomes, but more specific than the Department's mission; objectives support the mission and identify specific themes or opportunities for an agency to accomplish in order to achieve its mission. Like the agency's mission, objectives rarely change from year-to-year.
- Initiatives – What does an agency intend to accomplish that is new, better, or different? Initiatives are statements of an anticipated level of achievement; usually time limited and

very specific. An initiative may include reference to targets and/or standards, and is designed to help the Department meet its objectives. All initiatives contained in the agency performance plans should be externally focused.

- Key Performance Indicators – A standard of measure used to gauge quantifiable components of performance especially by comparison with a standard or target. Valuable metrics/measures should provide insight into the performance of a program in terms of inputs, outputs, efficiency, service quality, and/or outcomes. Each metric/measure should also be tied to a specific objective.
- New Innovation – For three key measures, we will ask agencies to provide descriptive information to supplement KPI data, which will explain to readers why performance has trended as it has.

ANNUAL BUDGET

Purpose – As part of the city’s commitment to a Performance-Based Budget, the Mayor’s annual budget submission to Council includes information around an agency’s historical and projected performance.

Cycle - The FY 2009 Budget and Financial Plan is the result of a year-long process that starts with strategic planning and culminates with the specific spending decisions in the budget. Budget preparation begins with the Office of Budgeting and Planning (OBP) in September and culminates with the budget submission to the Council in March. After the budget is approved by the Council, it is submitted to Congress.

Components (only as it pertains to Performance Management)

- Agency Mission – A short comprehensive description of why an organization exists. It succinctly identifies what an organization does (or should do), and for whom it does it.
- Summary of Services – What does the agency do? A brief summary of the programs and services managed and delivered by your agency.
- Objectives – A broad statement describing desired outcomes, but more specific than the Department’s mission; objectives support the mission and identify specific themes or opportunities for an agency to accomplish in order to achieve its mission. Like the agency’s mission, objectives rarely change from year-to-year.
- Key Performance Indicators (targets, actuals, and projected) – A standard of measure used to gauge quantifiable components of performance especially by comparison with a standard or target. Valuable metrics/measures should provide insight into the performance of a program in terms of inputs, outputs, efficiency, service quality, and/or outcomes. Each metric/measure should also be tied to a specific objective.

IV. A STEP-BY-STEP GUIDE TO DEVELOPING PERFORMANCE PLANS

As we noted previously, the foundation of performance management is the development of a performance plan. To this end, this manual focuses on the development of performance plans. Other instructional materials exist for the other documents highlighted, especially those associated with employee performance plans and evaluations.

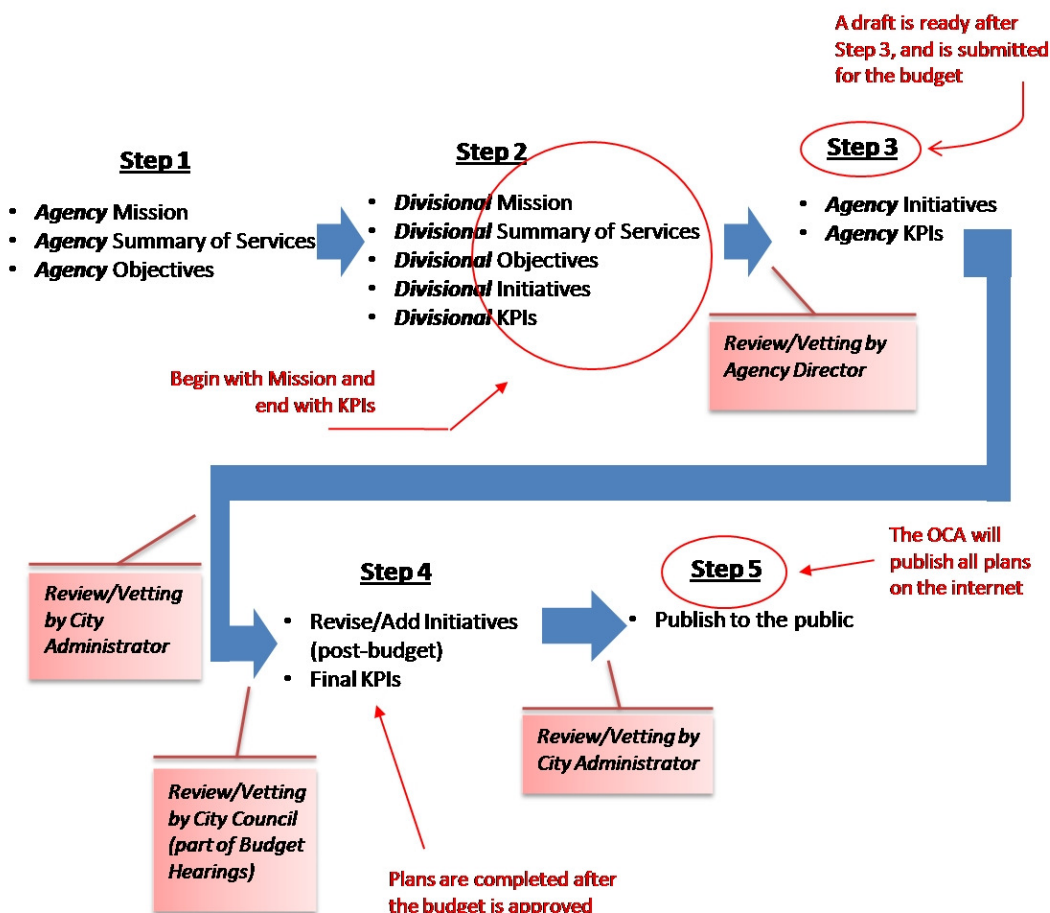
This process is meant to be adaptable to the unique circumstances within an agency, and to conform to events in the city, even if those events occur after the beginning of a fiscal year. There is a sequence to developing a plan. An agency plan needs to flow down to divisions, as well as absorb some elements that flow up from divisional plans. An agency's leadership should set the framework for its divisional plans by establishing a mission and agency-wide objectives. This is the bare minimum, but agencies can also choose to provide additional guidelines. Divisions then use this guidance to develop their own mission, objectives, initiatives and key performance indicators. An agency's leadership subsequently uses this thinking to determine which initiatives and KPIs make it into the agency plan.

A Note about the Guide

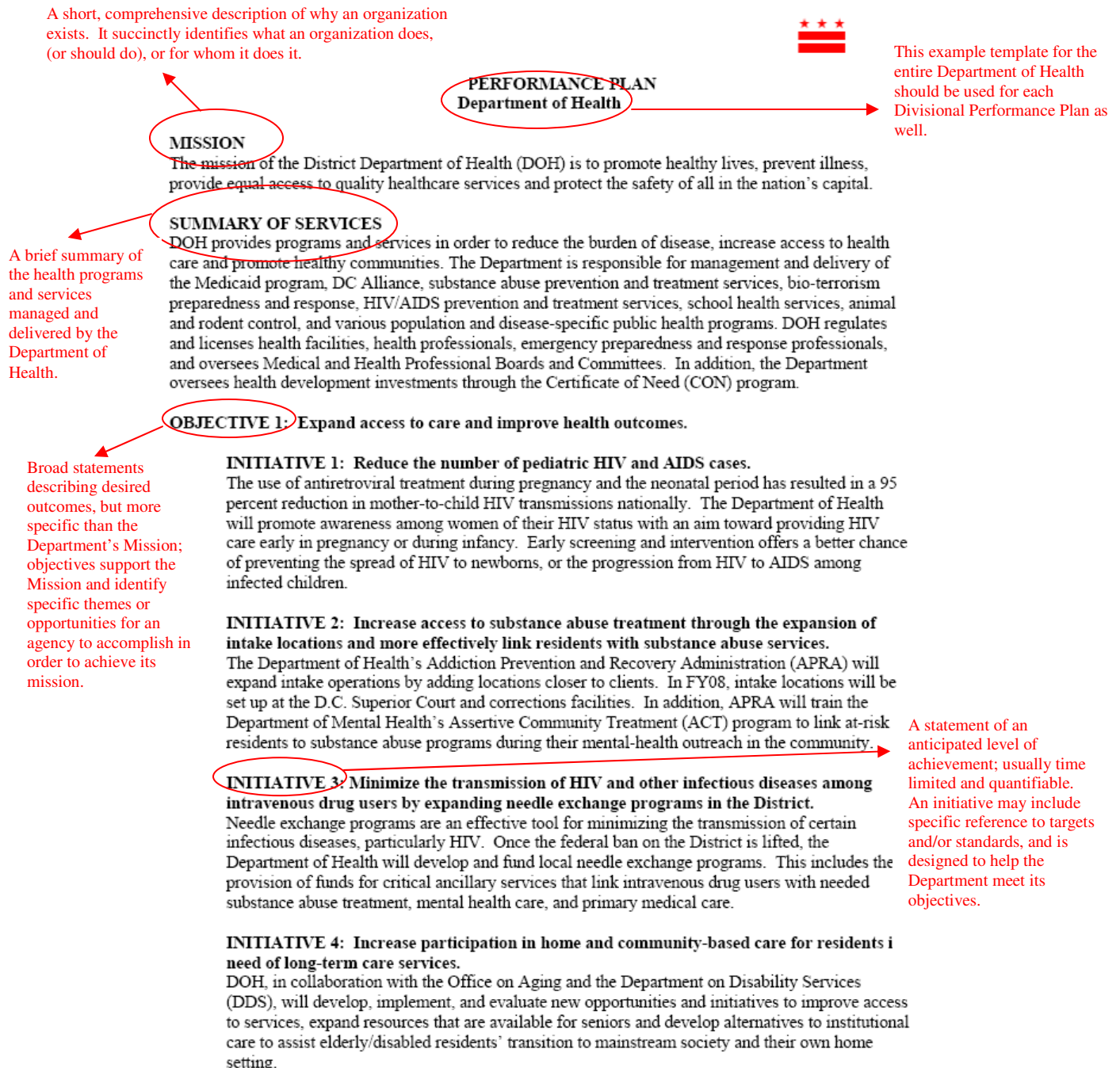
The chart conveys the sequence of activities for developing an agency performance plan.

As has been described, there are many common elements between an agency's plan and a division's plan. To avoid redundancy, we have organized this manual around guidance to developing each of the common elements, which apply regardless equally to both types of plans.

Sequence of Activities in Performance Plan Development



Let's begin the step-by-step guide by showing an example of an actual agency performance plan from the DC Department of Health.



The template on the prior page continues over as many objectives and initiatives as is relevant, although both divisions and agencies should limit their number to 3 – 5 objectives and 2 – 4 initiatives under each objective. At the end of the performance plan, we come to the KPI table.

A Metric or Measure is a fact or statistic reflecting a particular aspect of performance for a service or activity. They are used to ascertain the extent, dimensions, quantity, etc., of something, especially by comparison with a standard or target. Valuable metrics/measures should provide insight into the performance of a program in terms of inputs, outputs, efficiency, service quality, and/or outcomes. Each metric/measure should also be tied to a specific Objective.



Beginning in FY2010, agencies will be required to have at least 3 KPIs for each objective, and that one of these be an outcome measure.

PROPOSED KEY PERFORMANCE INDICATORS

Metric	FY06 Actual	FY07 YTD	FY07 YE Actual	FY08 Projection	FY09 Projection	FY10 Projection
Objective 1						
Number of participants in the Elderly and Physically Disabled Home and Community Based Services waiver.	TBD	TBD	1,603	1,700	1,940	2,180
Number of perinatal HIV transmissions.	4	TBD	TBD	0	0	0
Reduce number of HIV/AIDS cases transmitted through intravenous drug use.	42	30	TBD	20	15	10
Number of clients successfully referred to drug treatment by needle exchange programs.				2,000	2,050	2,100
Number of substance abuse intake locations.	8	11	11	14	16	18
Percent of children seen by school nurses who received a body mass index (BMI) measurement.				60%	70%	80%
Objective 2						
Number of dentists in fee-for-service dental network (Medicaid and Alliance).	44	63	75	150	200	200
Objective 3						
Percent increase in Medicaid program enrollment.	1%	0%	0%	2%	2%	1%
Number of health care expansions evaluated for cost-effectiveness.	5	5	5	5	5	5
Number of training sessions on accurate documentation and billing for Medicaid public providers.	2	2	2	4	4	4

Targets/Projections should be routinely revised based on prior years' actual performance; and should be used to push our performance toward continuous improvement.

HOW TO...REVIEW AND EVALUATE EXISTING AGENCY MISSION

Agencies should use their mission as identified during their strategic planning process. The mission should be a short, comprehensive description of why an organization exists. It succinctly identifies what an organization does (or should do), or for whom it provides goods or services. A good mission statement should:

- State what the agency does in broad terms
- Identify customers
- Explain why the agency exists
- Be associated with an outcome indicator (statement of accomplishment)

Two examples of strong mission statements:

- a. **OPM:** *Support the District Government through building operations, real estate management and capital construction.*
- b. **DMV:** *The mission of the Department of Motor Vehicles is to provide excellent customer service and to promote public safety by ensuring the safe operation of motor vehicles.*

Two examples of weaker mission statements:

- a. **OPM (FY07):** *The mission of the Office of Property Management is to provide a high-quality work environment and to ensure that District facilities are user-friendly. OPM's overarching vision is to be the trusted real estate advisor and asset manager for the District of Columbia and to maximize the value of property assets through coordination, strategic planning, financial management, business process improvement, and outreach efforts. The core values that infuse our efforts are quality, integrity, a sense of community, and a commitment to people.*
- b. **DHS (FY07):** *The mission of the Department of Human Services (DHS) is to "Up-Lift Lives" by providing quality-of-life support services to vulnerable individuals and families of the District of Columbia, promote maximum independence and secure futures through community-based services, coordination with other government agencies, and public and private partnerships.*

EXERCISE: CREATE A MISSION STATEMENT

1. What is your agency's purpose?
2. What products and services do you provide?
3. What are the agency's values?

To provide/produce **(service or product)** to **(customer)** in order to **(statement of accomplishment)**.

HOW TO...IDENTIFY SUMMARY OF SERVICES

What does the agency do? This is a brief summary of the programs and services managed and delivered by the agency. Programs and services should be consolidated into service areas for brevity and readability. Some agencies may have a single service area, while others may have several. Service areas should have a common purpose and lead to a common outcome for the customers of the service. To define service areas, identify the major programs and services you perform and collect these into a logical group with a common purpose. The summary should identify:

- Programs/Services that consume a major portion of the agency's budget
- Programs/Services that are critical to the success of the agency's mission
- Programs/Services that have a significant customer service focus

EXERCISE: IDENTIFY YOUR MAJOR ACTIVITIES

Identify your major activities

Do not identify every activity; focus on major activities

- critical to success of agency's mission
- consume significant portion of cost center budget
- politically sensitive or frequently in spotlight
- significant customer service focus

Group activities that have common objectives and/or customers:

HOW TO...DEFINE OBJECTIVES

At the next level are objectives, which are specific outcome-based statements of what will be accomplished within the budget year. These are broad statements describing desired outcomes, but are more specific than the agency's mission. Objectives support the mission and identify specific themes or opportunities for an agency to accomplish in order to achieve its mission.

Two good examples of effective Objective statements:

- a. **DCRA:** *Enhance customer satisfaction through efficient and effective regulatory and compliance processes.*
- b. **DMV:** *Ensure a skilled and diverse workforce for quality customer service.*

EXERCISE: DEFINE AN OBJECTIVE STATEMENT

A good objective statement should:

- Begin with a verb
- Be associated with an outcome indicator (statement of accomplishment)
- Be written to allow measurement of progress

Using the examples above, write an objective statement.

HOW TO...DEVELOP INITIATIVES

Initiatives are the heart of the performance plans. They express what we intend to achieve in language the public will understand. They are statements of an anticipated level of achievement; usually time-limited and quantifiable. In other words, initiatives convey to the reader what an organization intends to achieve that is new, better, or different with its budget. Agencies should tie every budget enhancement to an initiative, but not all initiatives need to be the result of budget enhancements. In fact, the most interesting initiatives are often budget neutral (indeed, most initiatives are budget neutral), because they reflect innovative ways of utilizing the same level of funding.

WHAT IS NEW, BETTER OR DIFFERENT?	
Is an Initiative	Is Not an initiative
<ul style="list-style-type: none">• Changing service delivery model• Rolling out a new service• Measurable and time limited	<ul style="list-style-type: none">• Setting a new target• Statement of services• Takes more than 3 years to achieve

Initiatives cannot simply restate a prior level of achievement, even if that achievement is outstanding. It should also not restate information contained in the KPI tables. For example, if an agency responds to 90% of customer requests in a timely fashion, then an initiative might be improving the quality of response. If that agency intends to increase its response rate from 90% to 95% (something reflected in the KPI table), then an initiative might state what change the agency is making in order to achieve this. An initiative may include specific reference to targets and/or standards, and is designed to help the agency meet its Objectives.

Initiatives express what we intend to achieve in language the public will understand.

Well-crafted Initiatives:

- Support the Objective(s)
- Consist of a main statement (written in bold), followed by a brief description, 2 to 3 sentences in length (not in bold)
- Reflect planned benefits(s) to consumers
- Allow for measurement of progress
- Allow for completion within no more than 3 fiscal years
- Are supported with current budgeted resources

Another example from the Department of Health:

- ***Reduce the number of pediatric HIV and AIDS cases***
The use of antiretroviral treatment during pregnancy and in the neonatal period has resulted in a 95 percent reduction in mother-to-child HIV transmissions nationally. The Department of Health will promote awareness among women of their HIV status with an aim toward providing HIV care early in pregnancy or during infancy. Early screening and intervention offers a better chance of preventing the spread of HIV to newborns, or the progression from HIV to AIDS among infected children.

Some of the best initiatives are budget neutral; here is an example from the DMV:

- ***Reduce wait times on Saturdays***

Currently, DMV has only one service center open on Saturdays. This results in longer wait times due to peak demand on Saturdays. By March 2008, DMV will change the operating days of one additional location from Monday through Friday to Tuesday through Saturday. Doing so will relieve crowding at the 95 M Street, SW location on Saturdays. This initiative is cost neutral.

Agency Performance Plan	Divisional Performance Plan
External Document: Posted on www.dc.gov	Internal Document: For management
Final signoff: City Administrator	Final sign-off: Department/Office Director
Must have: <ul style="list-style-type: none"> • Mission Statement • Summary of Services • Objectives • Initiatives • Key Performance Indicators (KPIs) 	Must have: <ul style="list-style-type: none"> • Mission Statement • Summary of Services • Objectives • Initiatives • Key Performance Indicators (KPIs)
Require at least one Initiative for each Objective	Encourage at least one Initiative for each Objective
Require at least three KPIs for each Objective	No requirement on the number of KPIs

V. A STEP-BY-STEP GUIDE TO DEVELOPING KEY PERFORMANCE INDICATORS

What is a Key Performance Indicator?

Key Performance Indicators (KPIs), also known as measures, are facts or statistics reflecting a particular aspect of performance for a service or activity. They are used to ascertain the extent, dimensions, quantity, etc., of something, especially by comparison with a standard or target. Targets are previously determined goals and should be routinely revised based on prior years' actual performance and should be used to motivate performance toward continuous improvement.

Good performance measures should be:

- **Simple**: Keep measures simple and straightforward.
- **Results-oriented**: Focus primarily on outcomes, efficiencies, and outputs.
- **Selective**: Concentrate on the most important indicators of performance. Do not use more measures than necessary.
- **Useful**: Provide information of value to the agency and decision-makers.
- **Accessible**: Provide periodic information about results.
- **Reliable**: Provide accurate, consistent information over time.

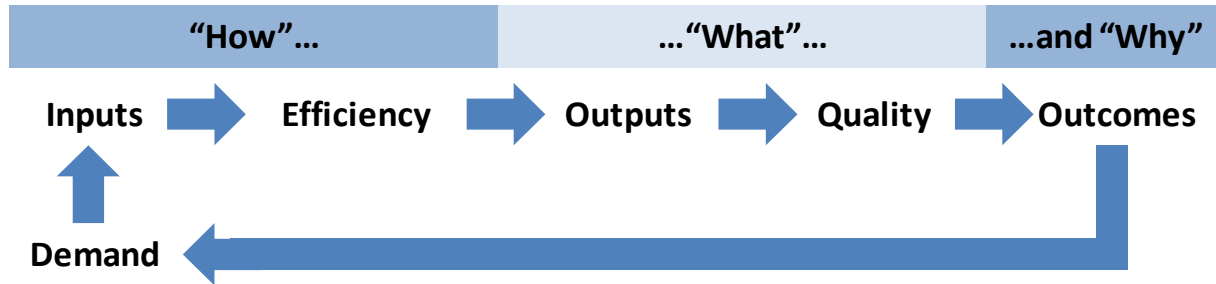
Steps for Creating Effective Measures

There is no magic formula for creating effective measures. There are many processes that can work. In fact, this manual offers two. You should adapt these guidelines to your agency needs.

IMPORTANT NOTE ON SEQUENCING

As we indicated in an earlier chart, always develop your mission first, then your summary of services and objectives, whether you represent a division or an entire agency. KPIs and Initiatives should be developed after these elements are in place.

Connecting the Diversity of Measures to Each Other



- **Inputs:** Resources invested to address an objective or issue
- **Efficiency:** Costs per unit, a reflection of process
- **Outputs:** Products and services produced
- **Quality:** The quality of those produced services and products
- **Outcomes:** The impact that these activities have on the community/customers
- **Demand:** A form of outcome, the assumptions partially driving budget decisions

APPROACH ONE: REVERSE ENGINEER YOUR KPIs

Step 1: Begin by defining outcomes, and quantifying those outcomes. Look at your mission and intended objectives and record what outcomes or impact your agency intends to make on the community or customer base. This approach starts by defining a fundamental value proposition: How do we know if we're making a difference?

Step 2: List and define the outputs that influence this outcome. Ask yourself and your staff what your organization does (what products or services you produce that influences this outcome). Like you did with outcomes, determine how you would quantify your success in producing these outputs.

Step 3: Balance output measures with quality and efficiency indicators – those elements directly associated with the process of creating those outputs. Measuring outputs themselves may be of limited value unless we can balance the volume of production with a quality and efficiency gauge.

Step 4: Round out an objective's scorecard by measuring inputs and demand. These elements are critical to a balanced scorecard, even if they are not related to actual performance. In fact, they may be entirely outside of your control. Increases and decreases may have no intrinsic value; however, they are helpful in budget planning.

Step 5: Clarify issues of data quality and integrity. The prior four steps will produce more ideas for measures that you will have the capacity or ability to track consistently. Data quality and data integrity can play a key role in determining which ideas you keep for your final plan and which you leave on the white board. Some questions to ask yourselves:

- Is this data we have or can realistically get?
- Is our data collection process sound?
- What confidence do we have that the data accurately reflects reality?

Here is an example of how this approach works. Let's take an example from DDOT. The District Department of Transportation has a Mission to ensure "that the mobility needs of people and goods are met safely." To fulfill part of that Mission, DDOT has an Objective to "Ensure that the District's transportation infrastructure is in a state of good repair." To track their progress toward meeting that

Objective, DDOT contracts with an outside engineering firm to measure the quality of street and bridge conditions, which feeds into an outcome measure: “Percent of streets in Good or Excellent condition.” Knowing that DDOT’s repaving volume has the single biggest impact on street conditions, the department also measures the output: “Percent of blocks in paving plan completed.” DDOT can also go a step further by gauging efficiency (“Cost per square yard for repaving”) and quality (“Number of pothole complaints per mile”), which both flow from the initial desired outcome.

APPROACH TWO: BUILD UP FROM YOUR INVESTMENTS

Step 1: Begin by examining your activities (budgeted activities or operational units) and list the key outputs that result from these activities. Obviously, operational units are different than budgeted activities, but either will serve you effectively. The notion here is to start the process with the elements of your organization that staff is most familiar with, either the investments (activities) or the organizational structure (operational units).

Step 2: Develop metrics to gauge the three elements of your activities: output, quality, and efficiency. Determine what these units produce and how you can measure that production. Remember that measuring outputs themselves may be of limited value unless you can balance the volume of production with a quality and efficiency assessment.

Step 3: Define and quantify the community/customer outcomes that these activities are intended to impact. Look at your outputs and record what outcomes or impact your agency intends to make on the community or customer base by engaging in these activities. This is the starting point for Approach One, but still includes addressing the fundamental value proposition: How do we know if we're making a difference?

Step 4: Round out an objective's scorecard by measuring inputs and demand. (See above description)

Step 5: Clarify issues of data quality and integrity. (See above description)

Here is an example of how this approach works. DDOT has a budget program called Transportation Operations. This program contains an activity called Transportation Safety, which received \$6.9 million in FY08. One of the primary services associated with transportation safety is replacing broken traffic signals and missing street signs. As an output measure, DDOT also tracks the percent of both signal repair and sign replacement that are done according to established timeframes. The most essential outcome of safety is fewer traffic crashes and fatalities. DDOT therefore has an outcome measure that tracks "the change in injuries and traffic crashes" and also the "fatalities at high accident locations."

What Should You Have at the End of the Process?

1. *You Will Need To Have a Mix of Measures*

Quality is paramount, but we also need to have quantity standards. By law, we are required to have at least one performance measure for each significant activity. Beginning in FY2010, we are requiring agencies to submit at least 3 KPIs for each objective, with at least one of these KPIs reflecting an outcome goal, and one reflecting an efficiency goal. The same requirement is true of an agency's divisional performance plans as well. There is no upper limit to how many measures you can have. The purpose of requiring multiple measures for each objective is to ensure that we track progress from a variety of different perspectives.

DEFINITIONS AND EXAMPLES OF DIFFERENT MEASURE TYPES

Measure Type	Definition	Example
<u>Input</u>	Value of resources used to produce an output.	<ul style="list-style-type: none"> • Dollars budgeted/spent • Staff hours used
<u>Demand</u>	Existing need for services. Also refers to workload or customer base.	<ul style="list-style-type: none"> • Call volume to investigation hotline • Requests for service
<u>Output</u>	Describes the level of activity that will be produced over a period of time. Outputs are activity oriented, measurable, and usually under managerial control.	<ul style="list-style-type: none"> • Children Immunized • Purchase Orders Issued • Tests Administered • Patients Transported
<u>Efficiency</u>	Reflects the economical and effective acquisition, utilization, and management of resources to achieve program outcomes or produce program outputs. Inputs used per unit of output (or outputs per input)	<ul style="list-style-type: none"> • Cost per test • Inspections completed per inspector
<u>Service Quality</u>	Degree to which consumers are satisfied with a program, or how accurately or timely a service is provided.	<ul style="list-style-type: none"> • Percent of respondents satisfied with the service • Average days to issue a purchase order • Error rate per test result
<u>Outcome</u>	Describes the intended impact of carrying out a program or activity. Focuses on “why” the service is provided and speaks to the ultimate benefit to the consumer. Managerial control may be limited by external factors, but managers are still responsible for outcomes.	<ul style="list-style-type: none"> • Rate of disease transmission • Number of infant deaths • Obesity rates • Percent of employees who demonstrate outstanding achievement in a performance review

The creation of divisional performance plans should aid agencies in their development of a balanced scorecard of measures. Agencies can select the most interesting and insightful objectives and measures. ***This is an important point to highlight: Not every objective and measure in a divisional performance plan should flow up to an agency performance plan. If it did, agency plans would be far too long to be readable. Agency plans should include only the most compelling objectives, initiatives, and measures.***

2. You Will Need to Record “Meta-Data” About Your Measures

Meta-Data refers to descriptive, clarifying information about your measures. It will require work to complete our meta-data worksheet, but it only needs to be done once, when you establish your measures, and then updated periodically. For each measure, you will be required to report:

- Reason for measuring it
- Responsible manager
- Collection methodology
- Data validation methods
- Frequency of collection

- Calculation formula
- Measure type (outcome, output, etc.)
- Corresponding objective and budget program
- Reason for data trend (only for three measures per agency, see below)

3. *You Will Need to Select Three Measures as “Featured Measures”*

In our year-end performance reports, we will provide more information about three measures per agency than we do about your other measures. More specifically, we will graph these measures and provide an assessment of why the data trended as it did.

OVERCOMING LIMITATIONS AND RESISTANCE TO PERFORMANCE MANAGEMENT

You may face resistance to implementing a rigorous performance management system in your agency or division. Most resistance is rooted in people’s concerns with the limits of performance management, and a belief that these limits outweigh the benefits. We obviously disagree, and want to assist you in responding to the most likely pushback you may receive.

❖ *“You can’t measure what I do.”*

RESPONSE: Performance management is so widespread across local and state governments that there is very little that someone, somewhere hasn’t found a reasonable way to measure. Areas thought to be “impossible to measure” require more creativity, motivation, and more work, but it can be done.

❖ *“I don’t want it measured unless I control it.”*

RESPONSE: Very few organizations have total control over the environment that they are trying to cover. But, if we only measured elements within our control, we would have a list of outputs, without regard to our customers or the community. The Metropolitan Police Department, for example, measures crime even though many factors influence crime rate. DDOT measures traffic fatalities, even though many other factors play a larger role in traffic safety. Yet if these agencies did not track outcomes, then they would be overlooking some of the most central features of their core mission.

❖ *“It will be used against me.”*

RESPONSE: It is true that commitment to transparency opens one up to criticism. But this scrutiny, even if unfair, provides motivation to improve performance. If you are open about where you need to improve, most people will give you the benefit of the doubt as long as you demonstrate that you are sincerely seeking to improve. In fact, being honest about your performance and how you can improve can actually help you win support for additional resources.

❖ *“I’ve seen this before. It’s just a passing fad.”*

RESPONSE: Measuring performance is not new, and it is not going anywhere. The pressure for more transparency is greater than ever, and will continue to grow. Templates may change, new forms may be required, but the act of transmitting for public debate agency performance is with us for the long term.

❖ *“We don’t have the data.” or, “We don’t trust the data we have.”*

RESPONSE: If a program is important enough to fund, it is important to find a way to measure the performance of that program. If data is not available for the ideal measure, then develop a meaningful measurement that taps into data you have or can get. There is more

than one way to measure almost any activity. A lack of data should generate ideas of other ways to gauge performance.

❖ *“We don’t have the resources to collect the data.”*

RESPONSE: Very few agencies have the ability or need to devote a full-time resource to performance management. It needs to be part of what nearly everyone does. Tracking should be part of day-to-day operations, not the result of issuances from on-high. Ideally, agencies will report to the City Administrator and the public a selection of activities that they have been tracking regularly for their own purposes for a long time.

Beware of the Unintended Consequences of Measuring Performance

There is a term in education – “teaching to the test” – that warns about the dangers of educating kids to be good test-takers at the expense of truly learning the subject. Along those same lines, be careful what you measure and how exclusively you look at measures. Ask yourself if there is a trade-off to an organization if they focus too heavily on hitting their numbers. In other words, is the organization letting one aspect of its operation suffer in order to meet their targets? If, for example, you measure timely response to service requests, then does some other aspect of your operation suffer in order to respond more quickly to customer requests? To this end, always make a point of measuring important activities from more than one perspective. Measure those trade-offs as well. They may be worth making, but you cannot make that decision unless you are aware of them.

VI. PERFORMANCE MANAGEMENT STYLE GUIDE

All Agency and Divisional Performance Plans are required to adhere to the same style guidelines in order to ensure consistency and uniformity. Please abide by the following structure:

The image is a screenshot of a Microsoft Word document titled "DMV.docx" in Compatibility Mode. The document is a performance plan for the Department of Motor Vehicles (DMV). It features a blue header bar with the text "Current Fiscal Year and Plan". Below this, the main title "FY08 PERFORMANCE PLAN" is centered, followed by "Department of Motor Vehicles". The document is divided into sections: "MISSION", "SUMMARY OF SERVICES", and "OBJECTIVE 1: Make it easier, faster, and friendlier to do business with DMV." Under "OBJECTIVE 1", there are two initiatives: "INITIATIVE 1.1: Reduce wait times on Saturdays." and "INITIATIVE 1.2: Revamp the DMV website to provide customers with enhanced information." The document is annotated with several callouts: "Times New Roman 12 pt font" points to the font settings in the ribbon; "One inch margins" points to the margin settings; "DC logo" points to a red star logo in the top right corner; "Agency Name" points to the text "Department of Motor Vehicles"; "Bolded Headlines" points to the section headings "MISSION", "SUMMARY OF SERVICES", and "OBJECTIVE 1"; and "1/2 inch indentation" points to the text under "INITIATIVE 1.2". The status bar at the bottom indicates "Page: 1 of 3" and "Words: 1,349".

Times New Roman 12 pt font

One inch margins

DC logo

Current Fiscal Year and Plan

FY08 PERFORMANCE PLAN
Department of Motor Vehicles

Agency Name

MISSION
The mission of the Department of Motor Vehicles (DMV) is to provide excellent customer service and to promote public safety by ensuring the safe operation of motor vehicles.

SUMMARY OF SERVICES
The DMV provides service to approximately 440,000 licensed drivers and identification card holders and 257,000 registered vehicles at four service centers. DMV conducts adjudication services and collects ticket payments for more than 2.4 million parking and traffic tickets each year. It also conducts over 219,000 annual vehicle inspections. Additionally, the DMV call center answers over 30,000 customer service calls every month.

OBJECTIVE 1: Make it easier, faster, and friendlier to do business with DMV.

INITIATIVE 1.1: Reduce wait times on Saturdays.
Currently, DMV has only one service center open on Saturdays. This results in longer wait times due to peak demand on Saturdays. By March 2008, DMV will change the operating days of one additional location from Monday through Friday to Tuesday through Saturday. Doing so will relieve crowding at the 95 M Street, SW location on Saturdays. This initiative is cost neutral.

INITIATIVE 1.2: Revamp the DMV website to provide customers with enhanced information.
DMV will revamp its website to provide information that is customer-focused and content driven. The new website will provide customers with enhanced information such as tips for buying and selling vehicles, information related to lemon laws, alternative-fuel vehicles and identity theft,

1/2 inch indentation

After all of the agency's objectives and initiatives have been listed and detailed, the Key Performance Indicators must be included in a table similar to the one below. Each KPI is tied to one of the objectives listed above. Please include all of the elements in the example: metric; previous year actual (if applicable); current year target; current year projected; projected target next fiscal year; projected target in 2 fiscal years; and projected target in 3 fiscal years. If the KPI is new, you will need to use N/A for the past and current years and make your projections going forward.

Font in the KPI table should be Times New Roman, 10pt

INITIATIVE 3.3: Develop and implement a registration and licensing transaction auditing process
 For these transactions, the internal integrity of regulatory requirements and protects the integrity of agency operations and increase the customer's trust in DMV's services. By January 2008, DMV will develop and implement a transaction auditing process.

PROPOSED KEY PERFORMANCE INDICATORS

Metric	FY06 Actual	FY07 Original Target	FY07 YE Actual	FY08 Projected	FY09 Projected	FY10 Projected
Objective 1						
% of mail adjudication hearings completed within 90 days of request ¹	N/A	N/A	N/A	80%	85%	90%
% of service center customers whose wait times are 40 minutes or less ^{1, 2}	N/A	N/A	N/A	80%	80%	80%
% of vehicle inspections completed within	N/A	N/A	N/A	80%	83%	85%

APPENDIX A: TIMELINE

Calendar Year	Deadline	FY 2008 Performance Plans	FY 2009 Performance Plans	FY 2010 Performance Plans
2008	July 1 st		Pilot Program agencies begin developing divisional performance plans	
	July 20 th	3 rd Quarter KPI Data due to OCA	Agencies (not part of pilot program) and OCA work together to create FY 2009 plans	
	September 30 th		Final Draft of Agency Performance Plan published by OCA	
	October 1 st		Fiscal Year Begins	Agencies begin planning for FY 2010 Performance Plan
	October 20 th	4 th Quarter KPI Data due to OCA		
	November 1 st			From November thru January, agencies will submit 1 st drafts of Agency and Division Performance Plans to OCA.
	December 31 st	Performance Accountability Reports due to OCA		
2009	January 15 th	PARs due to Council		
	January 20 th		1 st Quarter KPI Data due to OCA	
	March 1 st	PARs due to Congress		
	March 10 th			Final Pre-Budget Draft of Agency Performance Plan published by OCA with FY 2010 Proposed Budget
	April 20 th		2 nd Quarter KPI Data due to OCA	
	July 20 th		3 rd Quarter KPI Data due to OCA	
	September 8 th			With budget approved in early summer, agencies present final Performance Plans for publishing
	October 1 st			Fiscal Year Begins
	October 20 th		4 th Quarter KPI Data due to OCA	
2010	January 13 th		Performance Accountability Reports due to OCA	1 st Quarter KPI Data due to Office of the Director
	January 20 th			1 st Quarter KPI Data due to OCA
	April 20 th			2 nd Quarter KPI Data due to OCA
	July 20 th			3 rd Quarter KPI Data due to OCA
	October 20 th			4 th Quarter KPI Data due to OCA
2011	January 13 th			Performance Accountability Reports due to OCA

APPENDIX B: GLOSSARY

Actual	The actual level of performance, compared to the target level of performance, for each performance measure included
Baseline	The initial level of performance at which an agency is operating upon which future performance will be measured.
Benchmarking	The process of comparing and measuring an agency's performance on a particular process against the performance of best practice agencies.
Demand Measure	Refers to the amount of work assigned to or expected from the agency in a specified time period. Demand measures can include client populations and workload. They tend to cover an annual period and are not directly controlled by the agency.
Efficiency Measure	Reflects the economical and effective acquisition, utilization, and management of resources to achieve program outcomes or produce program outputs. They may also reflect ingenuity in the improved design, creation and delivery of services to the public, customers or beneficiaries by capturing the effect of intended changes made to outputs aimed to reduce costs and/or improve productivity, such as the improved targeting of beneficiaries, redesign of goods or services for simplified customer processing, manufacturability or delivery.
Goal	A general target toward which an agency strives to achieve.
Input Measure	Refers to the value of resources used to produce an output. For example, dollars budgeted/spent or staff hours used.
Key Performance Indicator	A particular value or characteristic used to measure output or outcome. A parameter useful for determining the degree to which an organization has achieved its goals. Synonymous with metric.
Metric	A standard or unit of measure. See Key Performance Indicator.
Outcome Measure	Describes the intended impact of carrying out a program or activity. Outcome measures define an event or condition that is external to the program or activity and that is of direct importance to the intended beneficiaries and/or the public.
Output Measure	Describes the level of activity that will be provided over a period of time, including a description of the characteristics (e.g., timeliness) established as standards for the activity. Outputs refer to the internal activities of a program (i.e., the products and services delivered).
Performance Management	The use of performance data to help organizations achieve their strategic goals
Performance Measure	Ways to objectively measure the degree of success a program has had in achieving its stated objectives, goals, and planned program activities.
Service Quality Measure	Reflects the degree to which customers are satisfied with a program, or how accurately or timely a service is provided.
Result	The outputs and outcomes you intend to track for a particular activity.
Target	Previously determined goals.

APPENDIX C: PERFORMANCE MANAGEMENT RESOURCES FOR FURTHER READING

The Office of Management and Budget (Federal), Expectmore.gov -
<http://www.whitehouse.gov/omb/expectmore/>

Fairfax, VA's performance measurement manual -
http://www.fairfaxcounty.gov/dmb/performance_measurement/Basic_Manual.pdf

Virginia's Performance Leadership and Accountability System -
<http://vaperforms.virginia.gov/>

ICMA Center for Performance Management -
<http://www1.icma.org/main/bc.asp?bcid=107&hsid=1&ssid1=50&ssid2=220&ssid3=297&t=0>